



USDA Weekly Retail Turkey Feature Activity

Fri. Nov 17, 2006

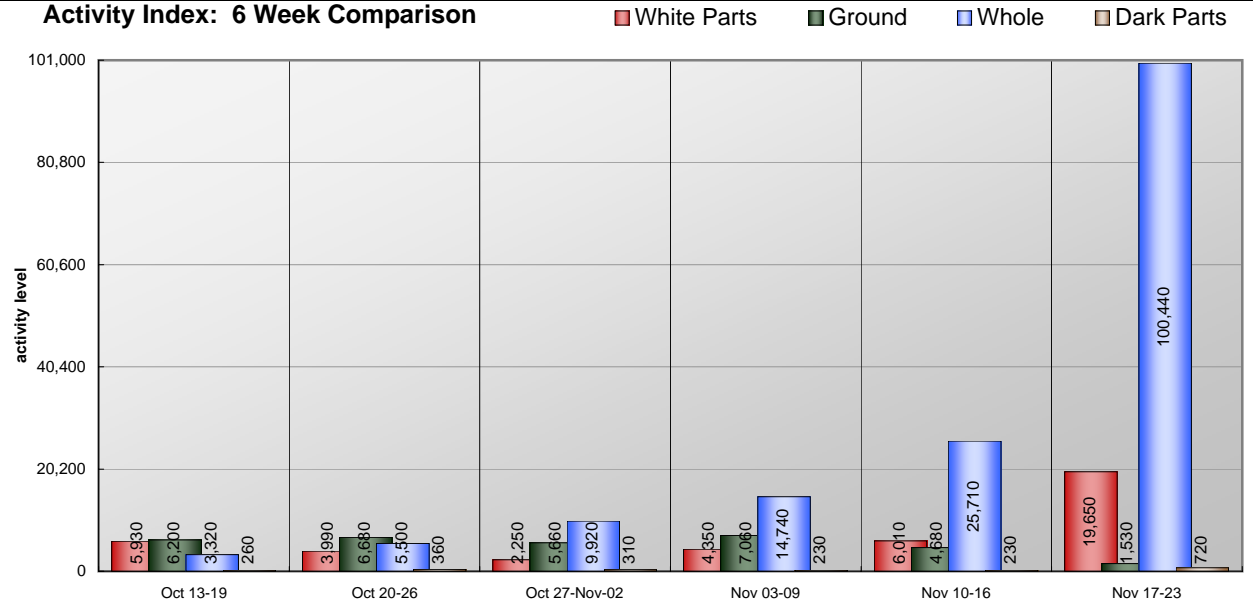
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 11/17 thru 11/23.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate 1/	99.6% of 17,000 outlets		61.4% of 17,000 outlets		100.0% of 16,700 outlets	
Special Rate 4/	13.3%		11.6%		23.6%	
Activity Index 2/	122,650		37,170		114,680	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens	21,950	1.22	2,300	1.13	23,590	1.16
" - Toms	22,040	1.22	2,300	1.13	22,970	1.15
Frozen - Hens	27,920	0.78	10,450	0.75	23,890	0.72
" - Toms	28,530	0.76	10,660	0.75	23,460	0.71
PARTS:						
Breast:						
Bone-in, whole						
Fresh	5,840	2.05	790	2.17	5,510	2.25
Frozen	9,670	1.65	1,670	1.78	8,380	1.43
Hotel Style						
Fresh	10	1.79				
Frozen			10	1.79		
Split, bone-in						
Fresh						
Rotisserie	3,460	7.88	630	7.17	1,780	7.96
Boneless, whole	240	3.27	30	4.24		
Cutlets	260	4.20	1,120	4.27	180	3.99
Cutlets, thin sliced	70	3.99	80	4.08		
Strips			730	4.54	120	3.99
Tenders	100	3.91	950	4.19		
Marinated Tenders	310	3.99	80	3.92		
DRUMSTICKS						
Drumsticks	100	1.13	200	0.99	990	1.29
Thighs	50	1.28			380	1.12
Wings	50	1.03			970	1.33
Necks	50	0.91				
Smoked Drumsticks	390	1.86	30	1.39	190	1.54
Smoked Wings	40	1.39				
Smoked Necks	40	1.39				
GROUND TURKEY:						
Patties	1,530	2.53	4,680	2.46	2,270	2.79
Sausage	30	2.46	420	2.45	160	2.42
85% lean	760	2.30	1,050	2.43	730	2.29
93% lean	70	2.23	30	0.99	130	1.65
Breast	290	2.08	2,810	2.31	500	2.21
Rolls (frsh/frz 1 lb.)	380	3.38	370	3.89	750	3.94
			460	1.05	--	--

Note: rolls not included in ground fresh ground turkey total and weighted average.

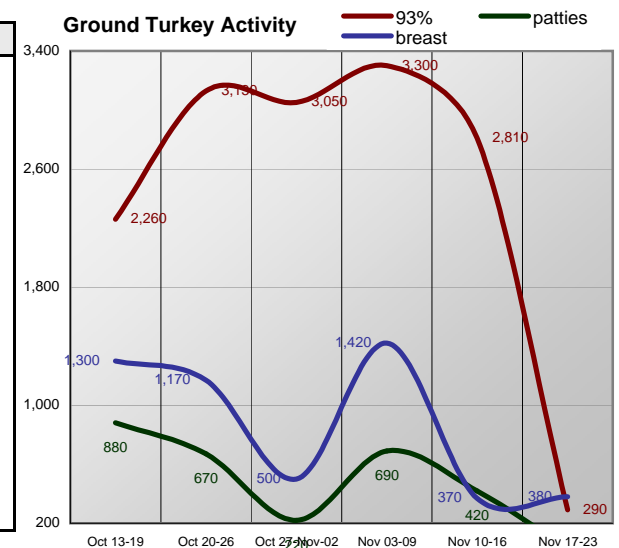
Activity Index: 6 Week Comparison



Turkey Featuring - 11/17 thru 11/23

With Thanksgiving only 6 days away, the biggest turkey promotional period of the year is well underway as retailers throw out all the stops in their bid to lure consumers over this all-important shopping weekend. Seasonal "purchase-based" promotions that have been in effect for the past several weeks at 35% of sampled grocers, are coming due this week at either free or significantly reduced prices. Average promotional prices for whole birds are up 5-7 cents per pound from last year with fewer fresh and significantly more frozen offers in the stores; reflecting the tightness of the fresh bird supply this year. Conventional birds are increasingly sharing ad space with "trendy" birds including natural, Organic, free-range, and Heritage. Breast cuts are enjoying significant promotions including in the deli where offerings of rotisserie breasts have doubled from last year. The retail deli is quickly becoming a food service force with over 76% of sampled outlets offerings store cooked dinners for the holiday. Dark cuts are seeing more ad space this week, mostly for smoked product, but ground turkey is scarce in ad space.

Ground Turkey Activity



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/: **FEATURE RATE:** the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. 2/: **ACTIVITY INDEX:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/: **STORES/AVG:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/: **SPECIAL RATE:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.)



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	EASTERN U.S. (CT,DC,DE,FL,GA,MA,MD,ME,NC,NH,NJ, NY,PA,RI,SC,VA,VT,WV)			CENTRAL U.S. (AL,AR,IA,IL,IN,KS,KY,LA,MI,MN,MO,MS,ND, NE, OH, OK,SD,TN,TX,WI)			WESTERN U.S. (AZ,CA,CO,ID,MT,NM,NV,OR,UT,WA,WY)		
Feature Rate 1/ Special Rate 4/ Activity Index 2/	99.8% of 7,900 sampled outlets 9.9% of stores w/ no-price promotions Activity Index = 61,740			99.3% of 5,200 sampled outlets 23.6% of stores w/ no-price promotions Activity Index = 29,810			99.6% of 3,900 sampled outlets 7.1% of stores w/ no-price promotions Activity Index = 31,100		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens	0.68 - 1.59	11,790	1.19	0.77 - 1.69	4,480	1.19	0.77 - 1.69	5,680	1.31
" - Toms	0.68 - 1.59	11,660	1.19	0.77 - 1.69	4,700	1.18	0.77 - 1.69	5,680	1.31
Frozen - Hens	0.29 - 1.39	13,530	0.82	0.29 - 1.29	7,680	0.75	0.38 - 1.39	6,710	0.74
" - Toms	0.29 - 1.39	13,720	0.81	0.29 - 1.29	7,850	0.75	0.23 - 1.39	6,960	0.69
PARTS:									
Breast:									
Bone-in, whole									
Fresh	1.39 - 2.99	2,650	1.89	1.39 - 2.79	1,430	2.10	1.99 - 2.69	1,760	2.25
Frozen	0.89 - 2.79	5,240	1.63	0.79 - 2.49	2,720	1.64	1.59 - 1.99	1,710	1.73
Hotel Style									
Fresh	1.79	10	1.79						
Frozen									
Split, bone-in									
Fresh									
Rotisserie	4.98 - 8.99	660	7.08	5.99 - 8.99	400	7.74	6.99 - 8.99	2,400	8.12
Boneless, whole	3.49 - 4.49	80	3.99	2.69 - 3.00	10	2.82	2.67 - 2.99	150	2.92
Cutlets	3.99	160	3.99	4.53	100	4.53			
Cutlets, thin sliced	3.99	70	3.99						
Strips									
Tenders				3.91	100	3.91			
Marinated Tenders	3.99	310	3.99						
Drumsticks	0.89 - 1.28	80	1.16	0.99	10	0.99	0.99	10	0.99
Thighs	1.28	50	1.28						
Wings	0.89 - 1.27	40	1.03	0.99	10	0.99			
Necks	0.89		0.89	0.89 - 0.99	50	0.91			
Smoked Drumsticks	1.29 - 1.89	340	1.85	1.89	50	1.89			
Smoked Wings	1.17 - 1.67	40	1.39						
Smoked Necks	1.17 - 1.67	40	1.39						
GROUND TURKEY:									
Patties	2.39	10	2.39				2.50	20	2.50
Sausage	1.99 - 2.69	750	2.30	2.79	10	2.79			
85% lean	1.59	20	1.59	2.49	50	2.49			
93% lean	1.99 - 2.49	250	2.06	1.98	20	1.98	2.40	20	2.40
Breast (99-100% lean)	2.99 - 4.39	240	3.19	2.99 - 3.91	140	3.69			
Rolls (frsh/frz 1 lb.)									

A full breakdown of supermarket promotions featuring turkey and other poultry for Thanksgiving will be available on November 22, 2006 on our website at:

www.ams.usda.gov/poultry/mncs/Holiday%20Ads/HolidayAds.htm

This report provides a detailed breakdown of supermarket holiday promotions by region, state, and grocery chain including brand names, prices, and any special conditions for whole turkeys, turkey breasts, turkey dinners, roaster chickens, capons, cornish hens, ducklings, geese, baking hens, and poultry-based broth and gravy.